



Spring Trade Ally Forums
April 2018

Breakout Topics & Locations

Breakout Session A: 10:00 – 10:50

Fireside	Bethany House	Lounge
Craft3 On-Bill Repayment Process	Heat Pump Water Heaters: Product & Sales Training with AO Smith & Supply Chain Offerings	Energy Trust Solar Program Updates
Tawney Reader, NMLS, Senior Consumer Lender, Craft3	Casey Hollabaugh	Jeni Hall, Senior Project Manager – Solar, Energy Trust

Breakout Topics & Locations

Breakout Session B: 11:10 – 12:00

Fireside	Bethany House	Lounge
Existing Buildings Program Updates	Ductless Heat Pump Sizing and Heat Pumps in Manufactured Homes	Oregon Solar Energy Industries Association (OSEIA)
Nick Dreves, Existing Buildings Outreach Manager	Bruce Manclark, Director of Training, CLEAResult	Kyle Diesner and Andrew Shepard

Who is here this morning?





Grants Pass



Energy Trust Highlights Spring Trade Ally Forums April 2018



2017 Accomplishments: Statewide

 **64.3 aMW saved**
Most savings to date



**\$102 million+
incentives paid**

**6.8 million
annual therms
saved**
 *Ties most savings to date*



**56,000 sites
served**

 **4.42 aMW
renewable energy
generated**

2017 Accomplishments: Josephine, Jackson and Douglas Counties



**More than \$6.5 million
incentives paid**



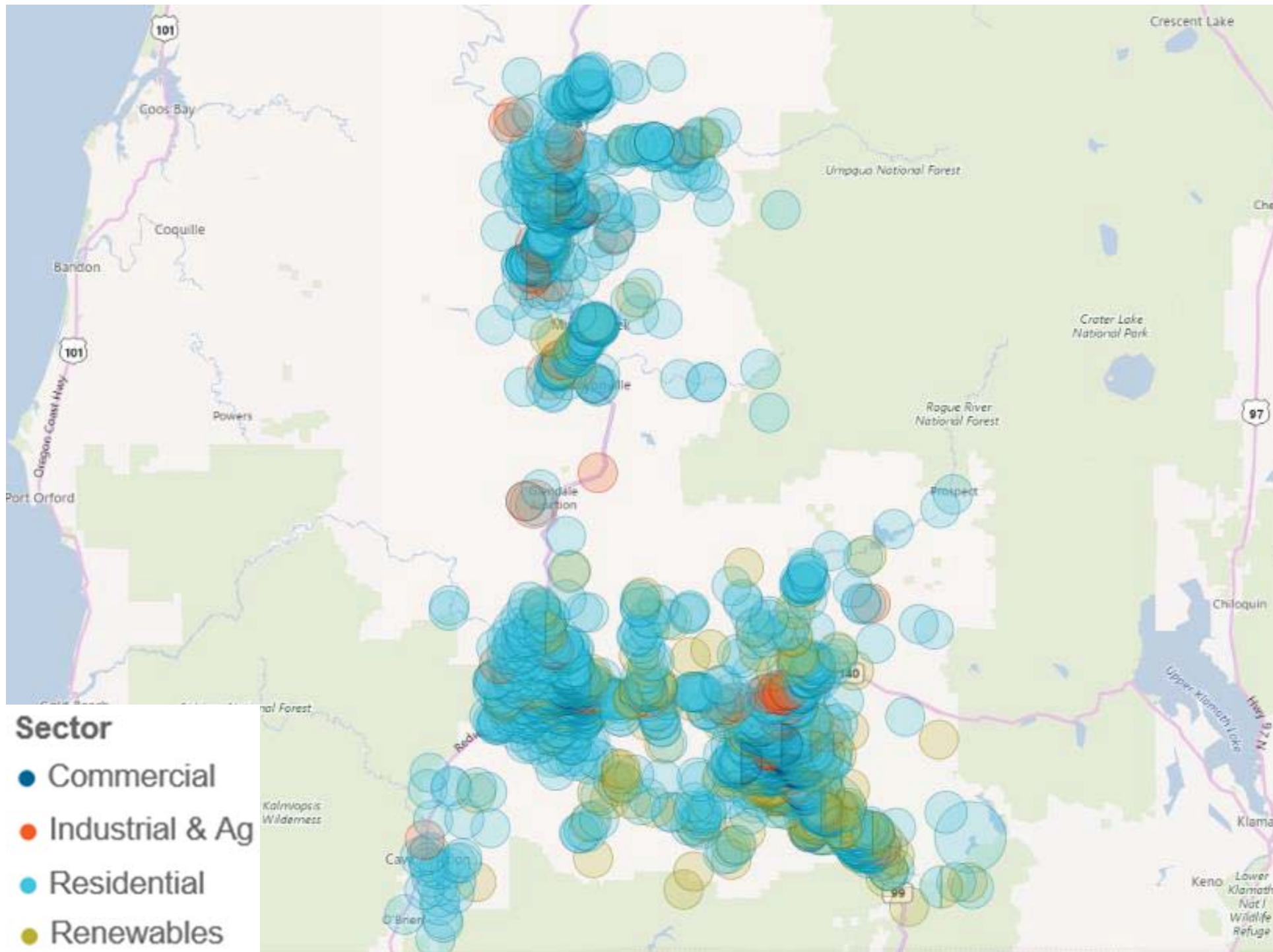
5,300 total sites



39M kWh saved



304K therms saved



2018: What's Ahead

- New-and-improved Find-a-Contractor tool
- Trade ally survey





Growth Areas

- Small business sector:
 - Small sites = >20,000 sq. ft.
 - 32 percent have worked with Energy Trust
 - **70 percent of small sites unserved**
- Large business sector:
 - 30 percent remaining market share
- Medium business sector:
 - 46 percent remaining market share

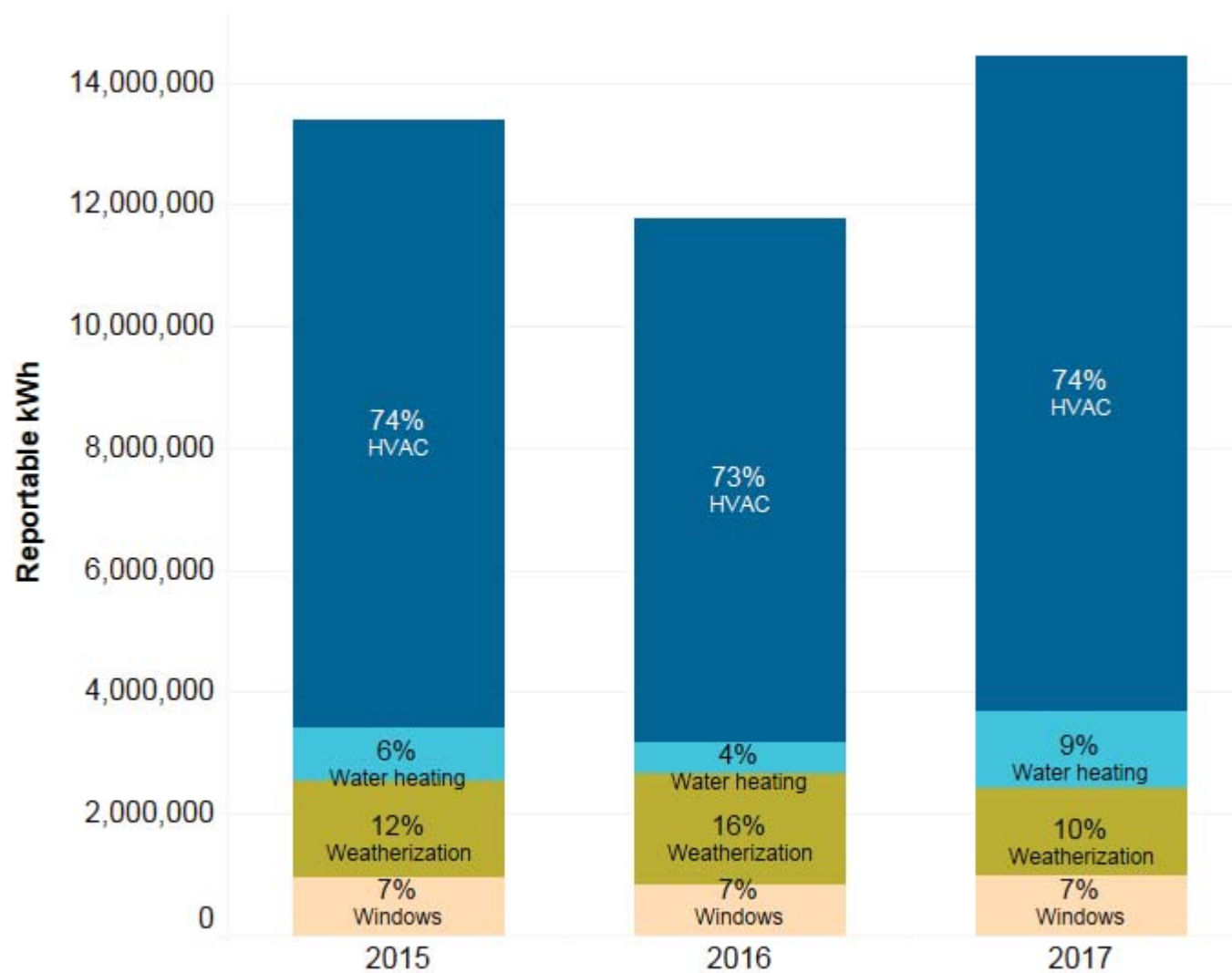


Mike Colgrove
Executive Director,
Energy Trust of Oregon

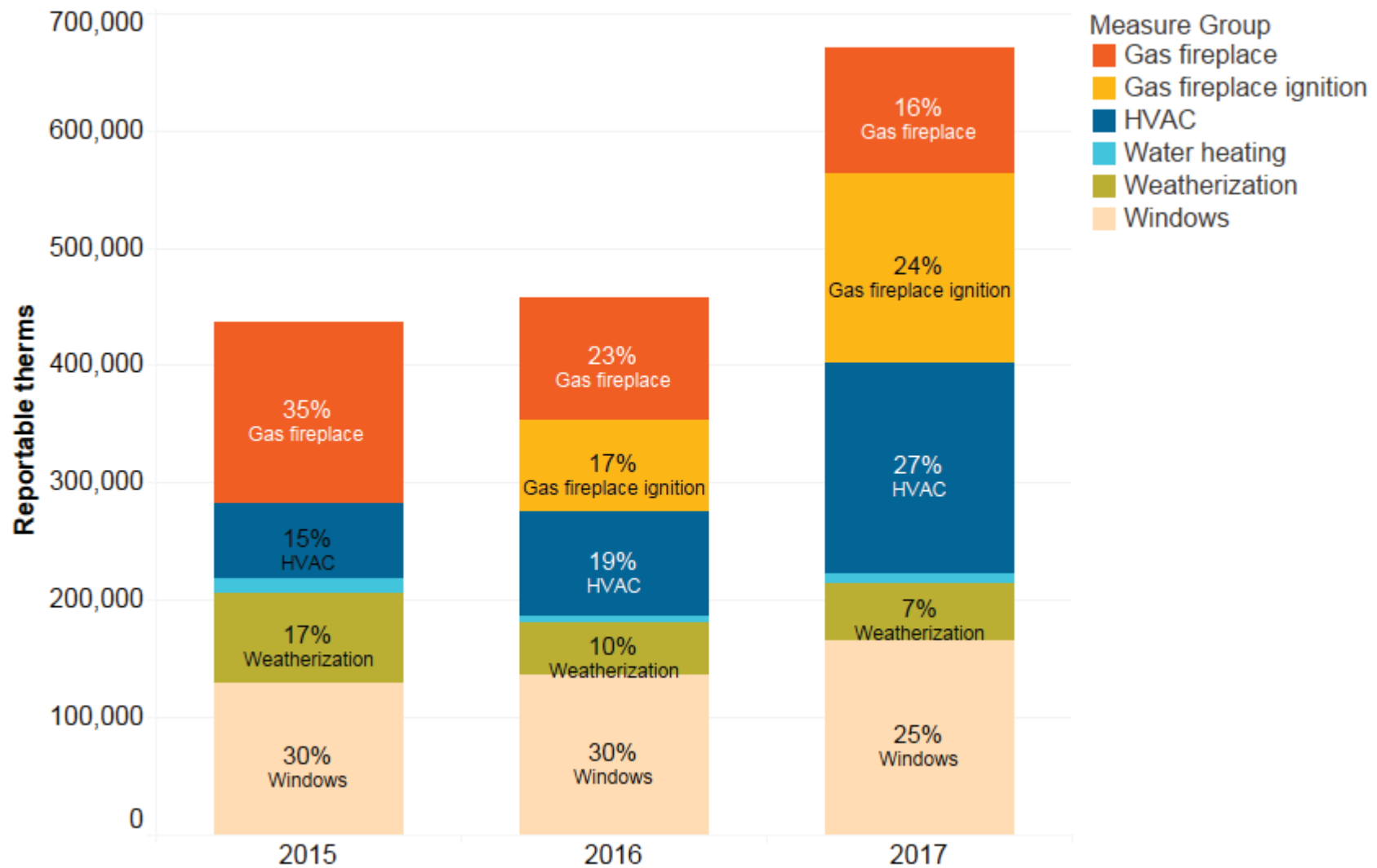
Trade ally forums

2017 Residential Home Retrofit & EPS™ New Construction

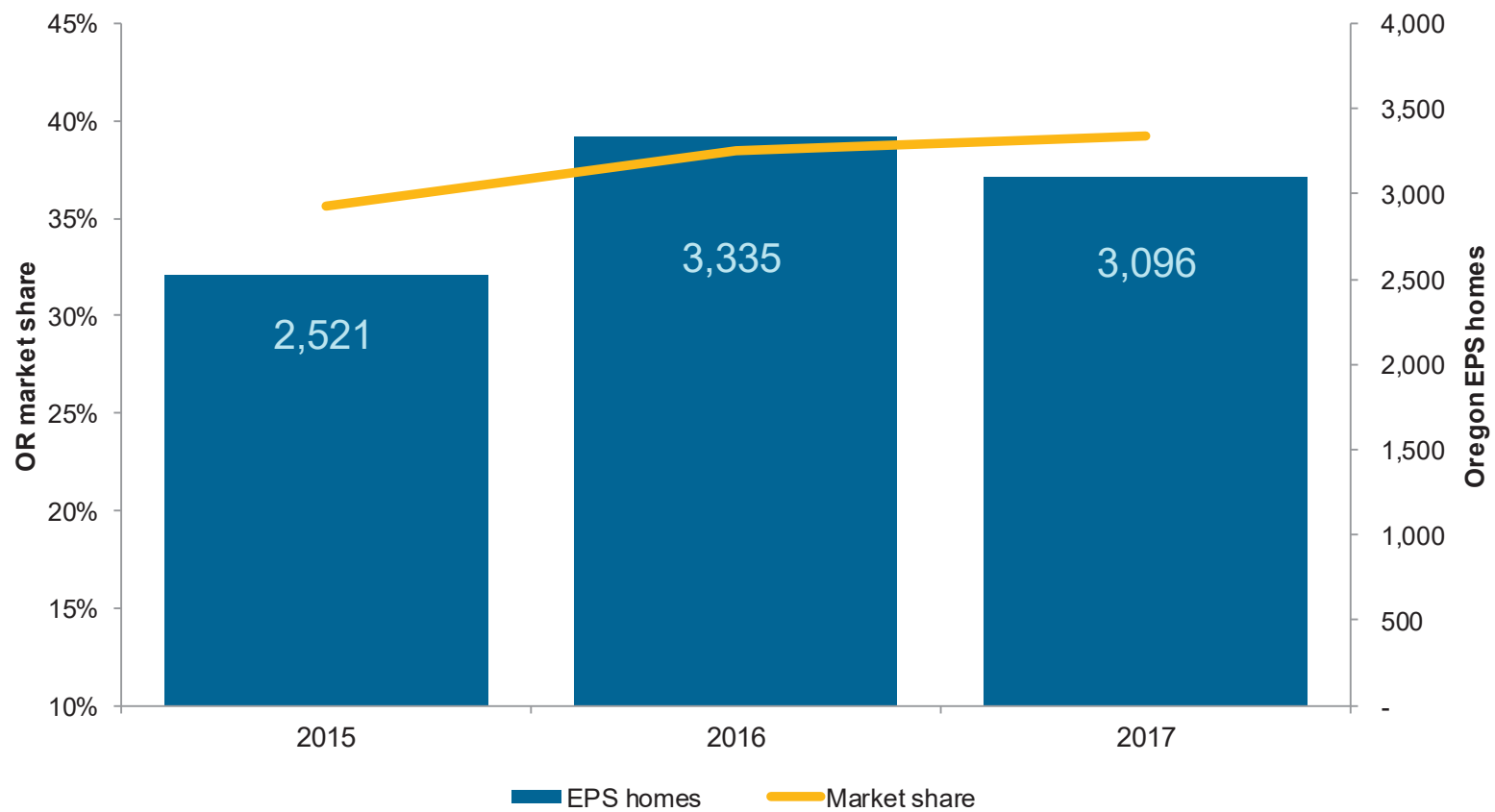
2017 Home Retrofit Drivers: Electric



2017 Drivers: Gas



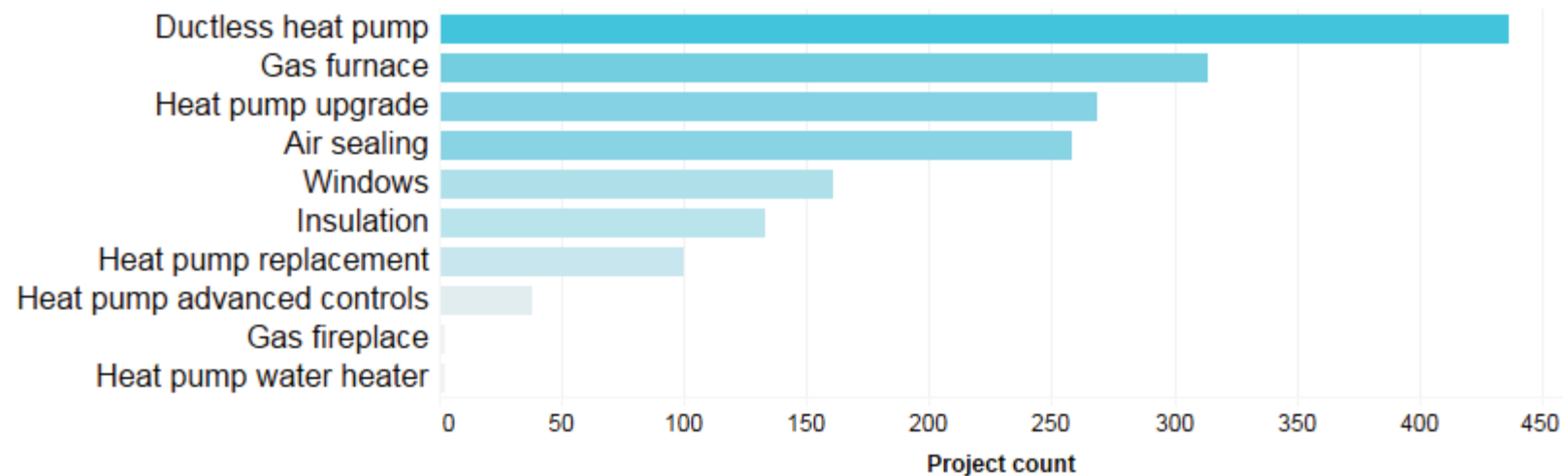
EPS Market Share



Southern Oregon Trends

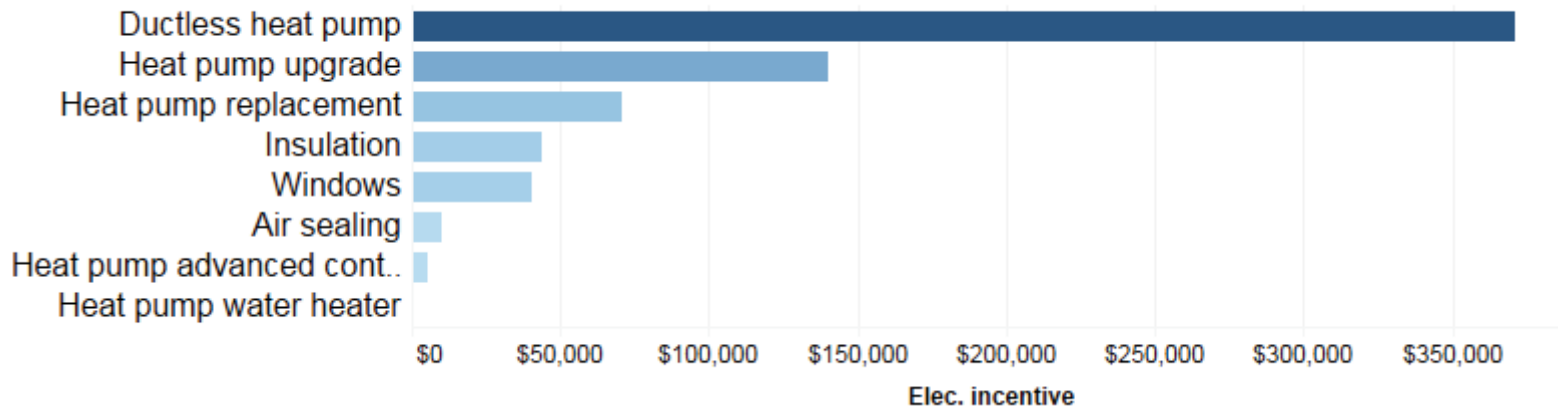
Home Retrofit – Southern Oregon (projects)

Southern OR Projects

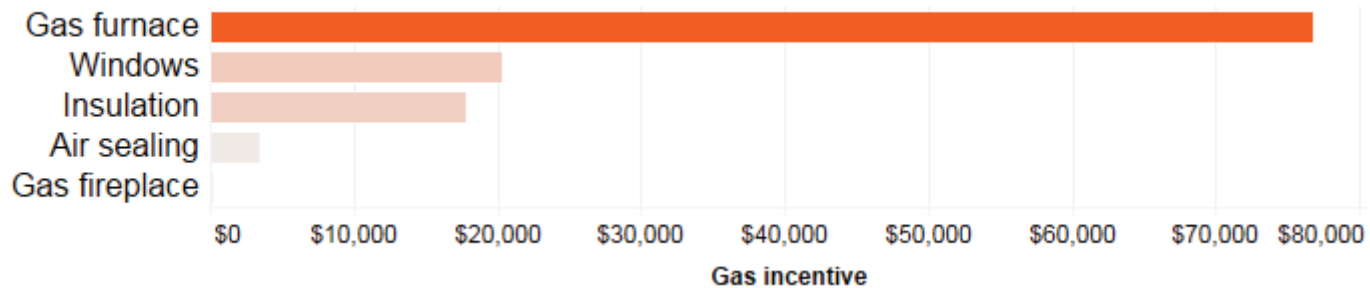


Home Retrofit – Southern Oregon (incentives)

Southern Elec. Incentive

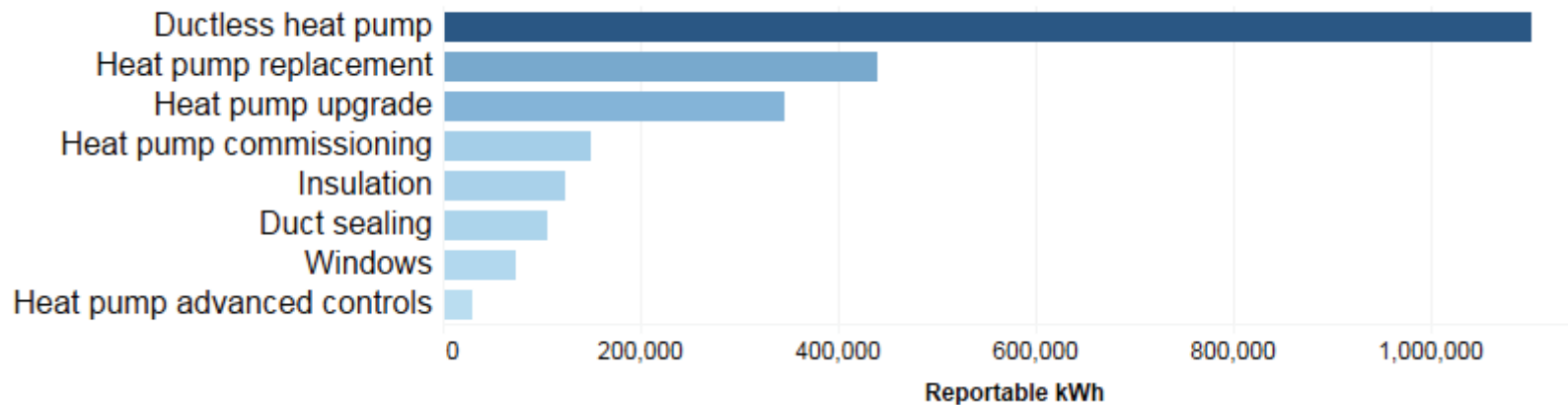


Southern Gas Incentive

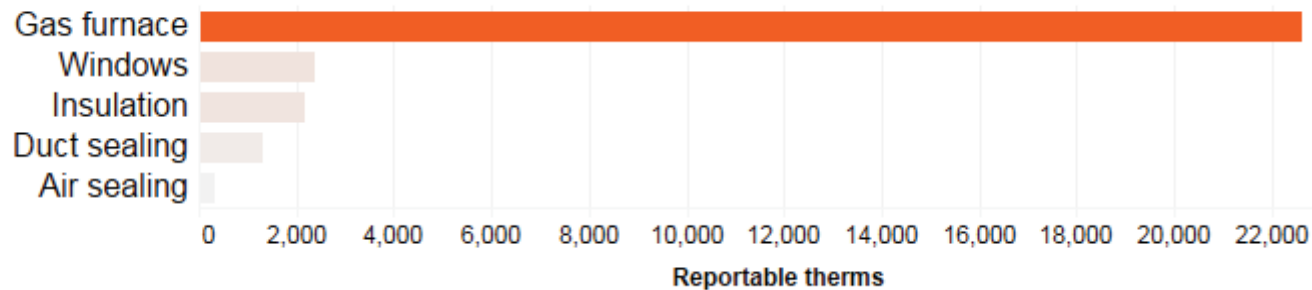


Home Retrofit – Southern Oregon (savings)

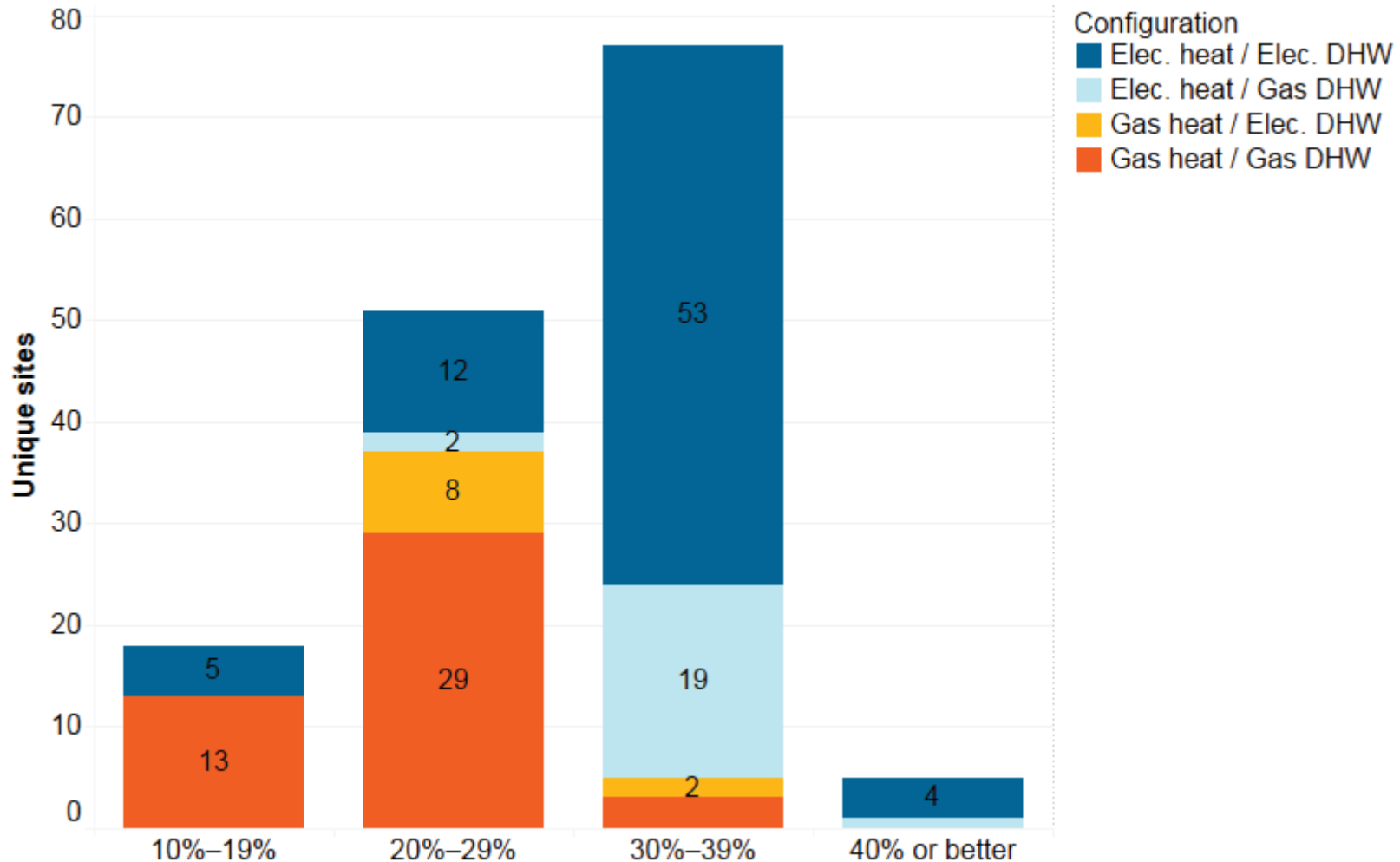
Southern OR Elec. Measures



Southern OR Gas Measures



Number of Homes by % improvement and home configuration: Southern Oregon



2018 Priorities

2018 Priorities

- Expand Participation
 - Targeted Marketing
 - New Opportunities: Manufactured Homes
 - Efficient Controls
 - Supply-Chain Offerings





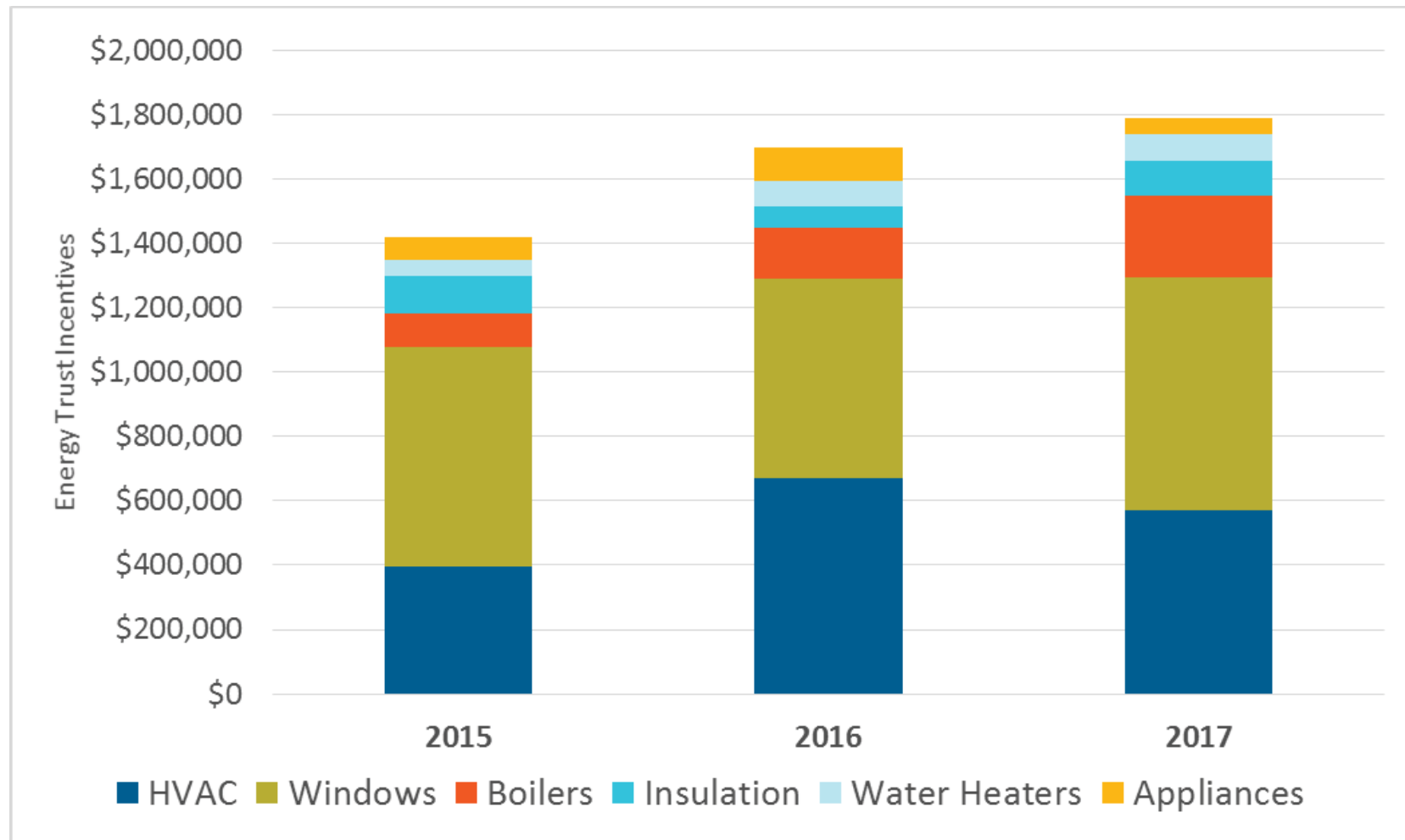
Existing Multifamily Program

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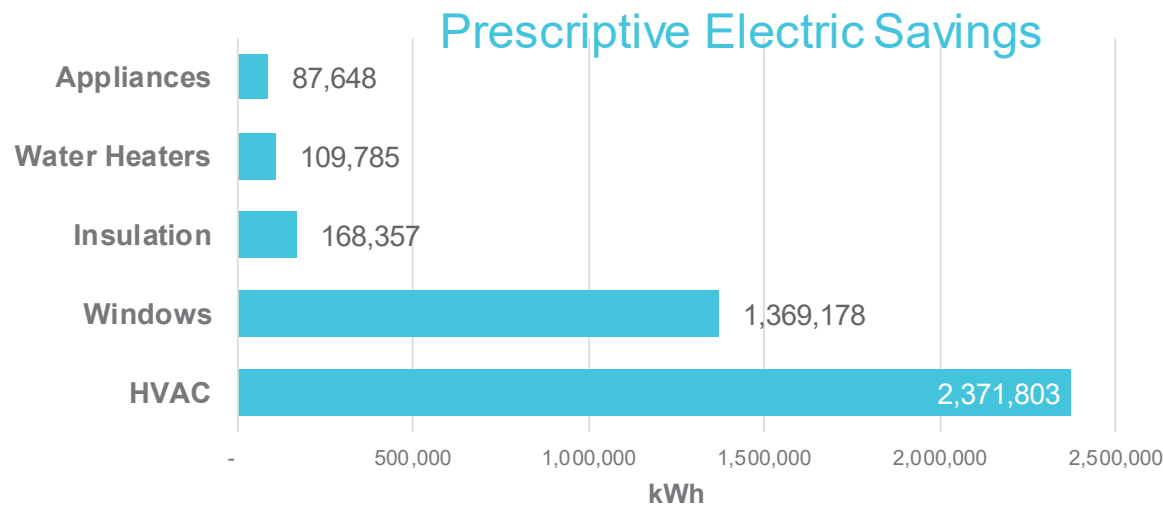


Multifamily Prescriptive Incentive Trends



1,804 prescriptive projects in 2017
\$1.7M prescriptive incentives paid

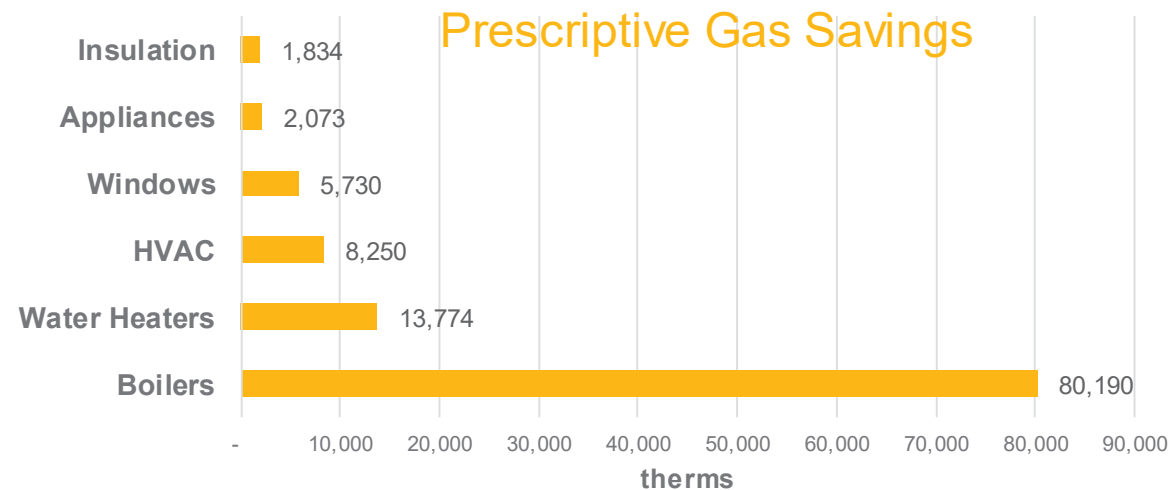
2017 Existing Multifamily Savings



2017 Electric Savings by Track

Lighting	39%
Direct Install	33%
Prescriptive	25%
Custom	3%

Total 16,052,407 kWh

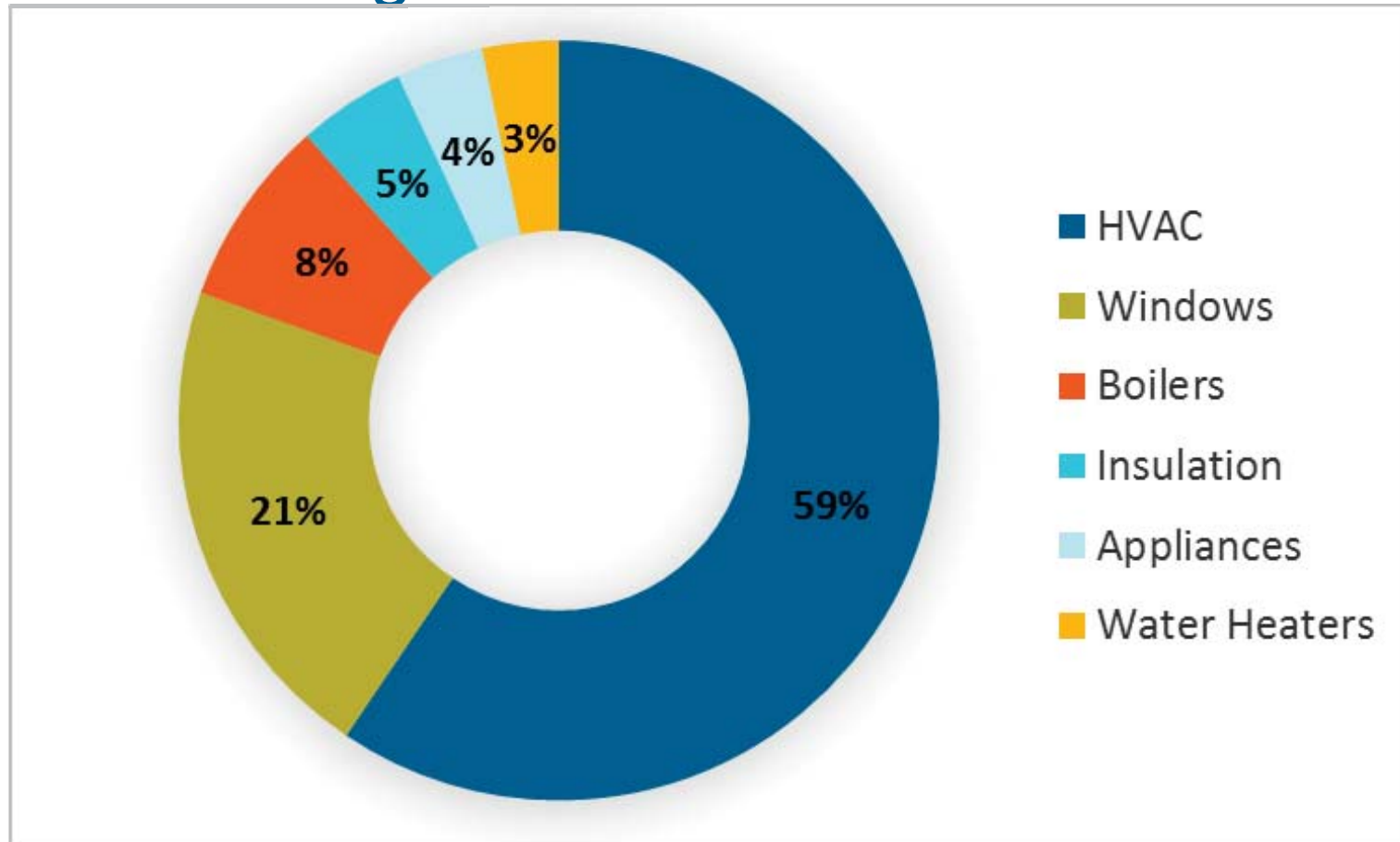


2017 Gas Savings by Track

Prescriptive	62%
Direct Install	24%
Custom	14%

Total 181,642 therms

2017 Prescriptive Incentives Southern Oregon



- 2017 Avista gas addition provides opportunity for gas measures
- Additional offerings: direct install, custom incentives, walkthroughs

2018 Priorities

2018 Priorities

- **Expand** participation across all territories served by Energy Trust
- **Enhance** relationships with trade allies, distributors and manufacturers
- **Optimize** program offerings to provide actionable services to participants and trade allies
- **Utilize** data driven tools to identify areas of targeted outreach
- **Seek** new savings opportunities by conducting field tests and pilots



Thank you

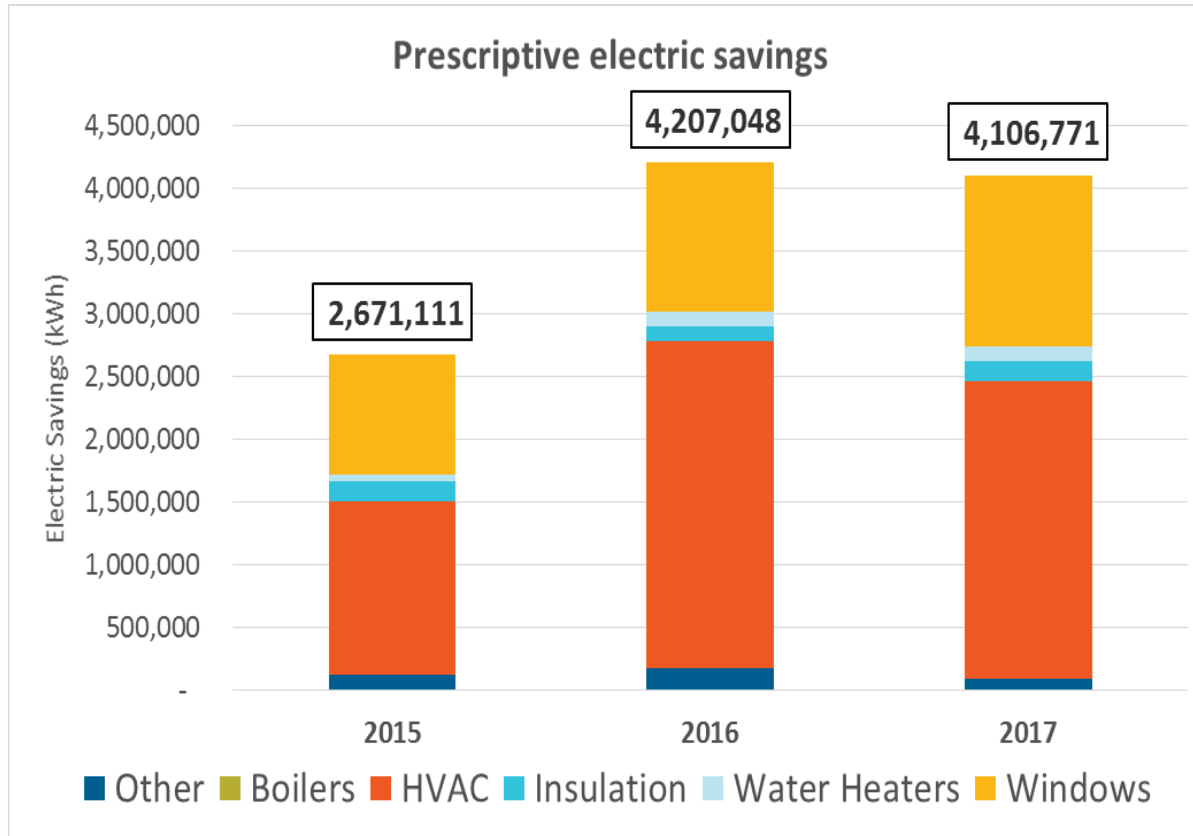
Kate Scott, Existing Multifamily Program Manager

kate.scott@energytrust.org



ADDITIONAL SLIDES

Multifamily Electric Savings – Statewide



2017 Electric Savings by Track

Custom	3%
Direct Install	33%
Lighting	39%
Prescriptive	25%

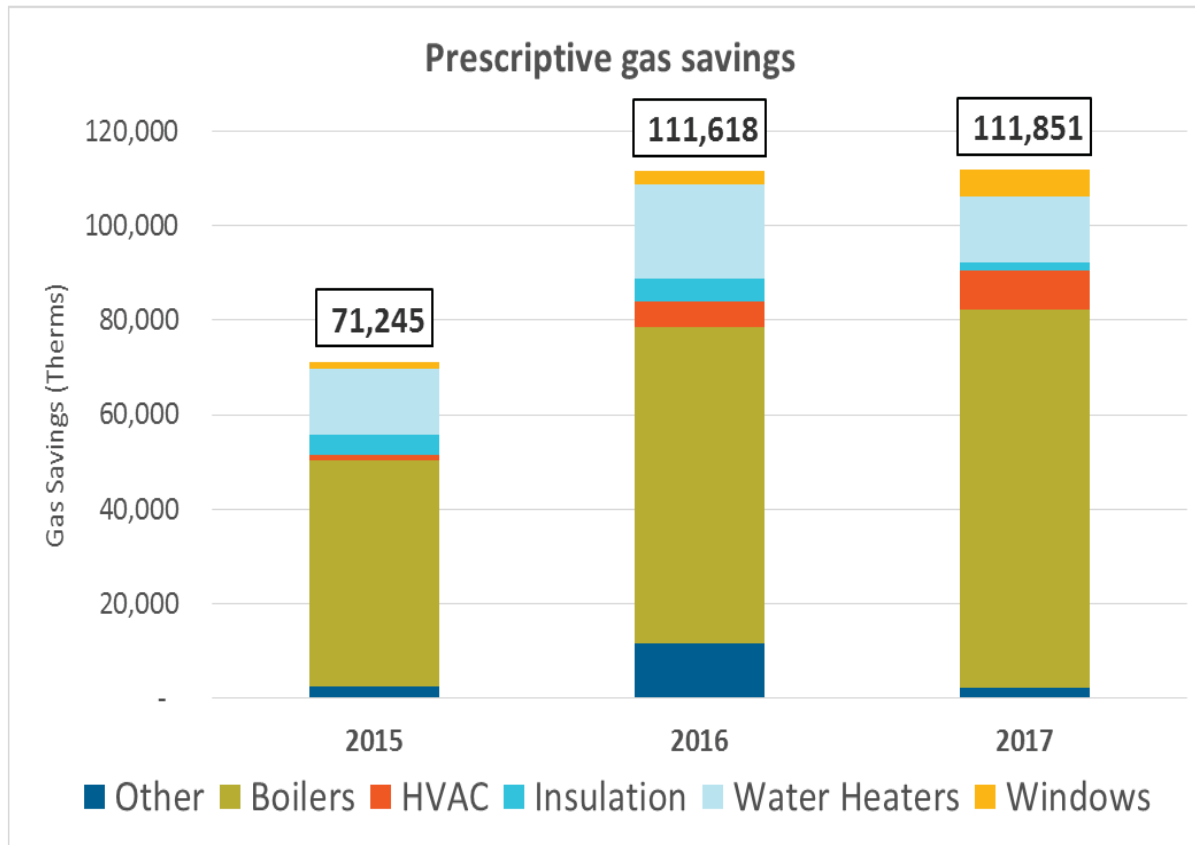
Total 16,052,407 kWh

Incentives paid for prescriptive electric projects in 2017 **\$3,250,301**

Prescriptive electric projects in 2017

2790

Multifamily Gas Savings – Statewide



2017 Gas Savings by Track

Custom	14%
Direct Install	24%
Prescriptive	62%

Total 181,642 therms

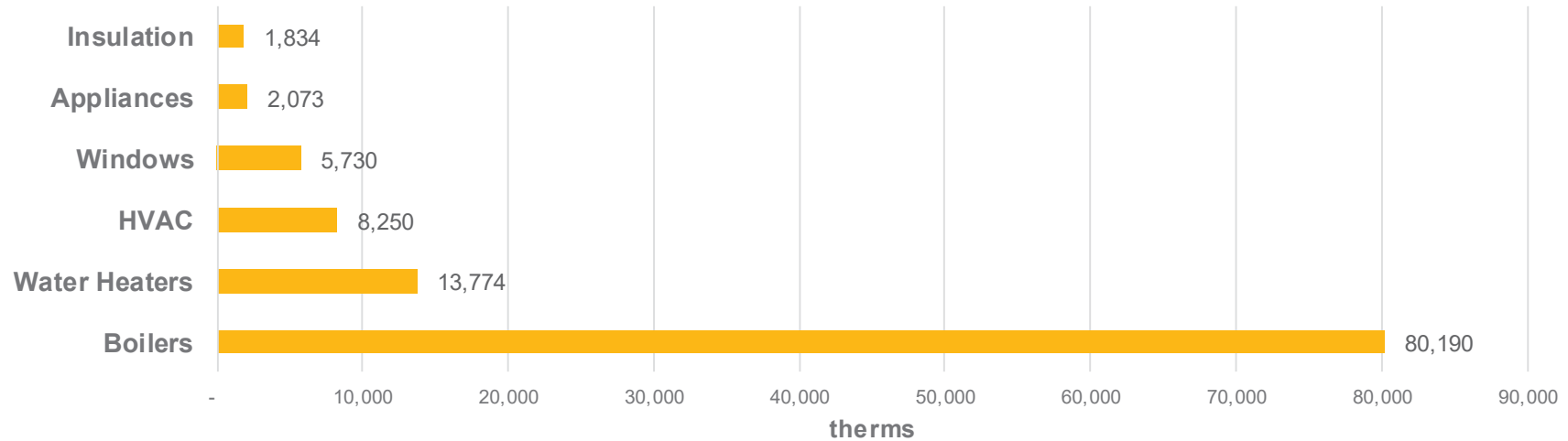
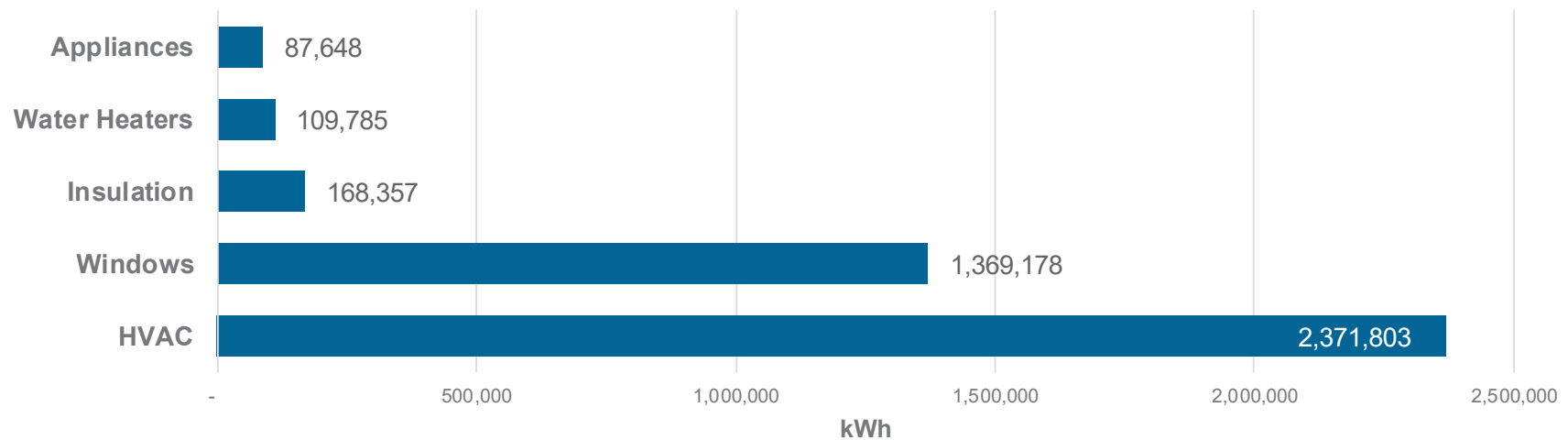
Incentives paid for prescriptive gas projects in 2017

\$592,807

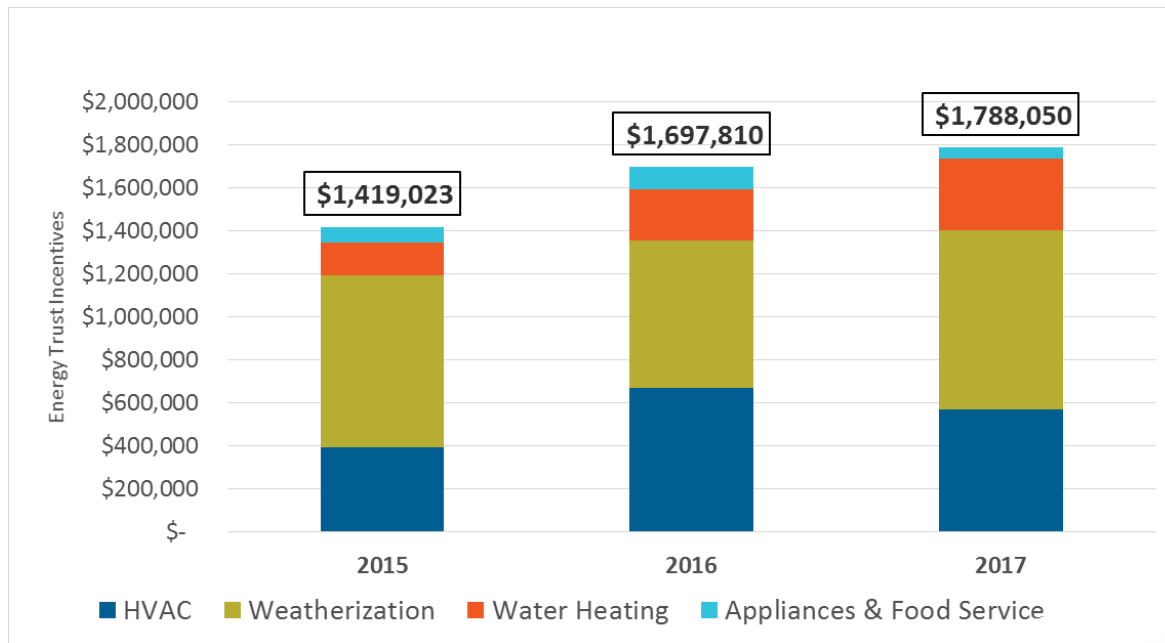
Prescriptive gas projects in 2017

611

2017 Prescriptive Savings - Statewide



Prescriptive Incentives - Statewide

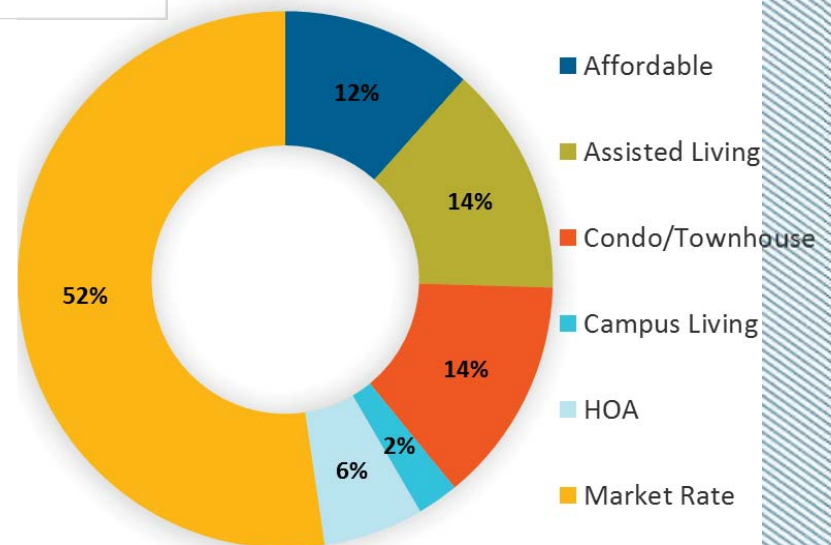


Prescriptive projects submitted in 2017

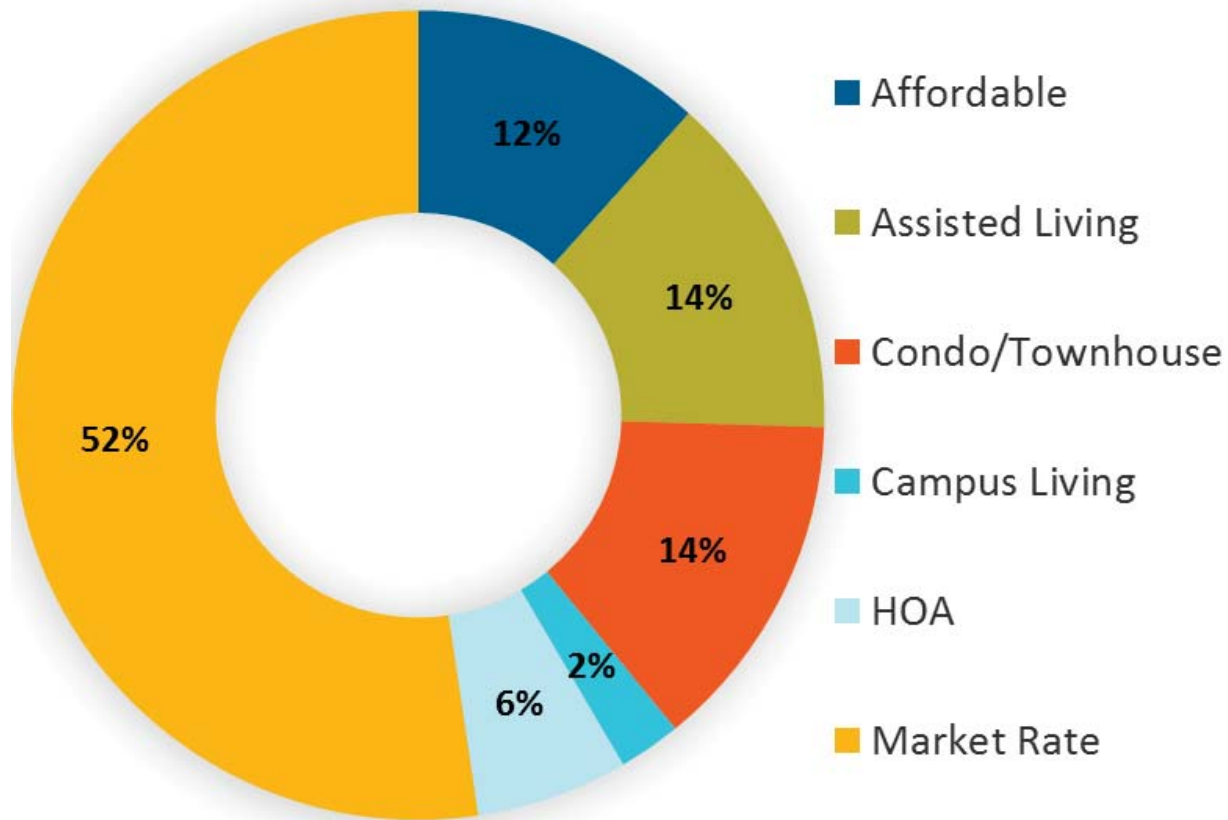
3401

Top Prescriptive Measures 2017

Ductless heat pumps – 1,1.5 & 2 ton
Windows – stacked structure single pane
Condensing boiler
Condensing tank water heater



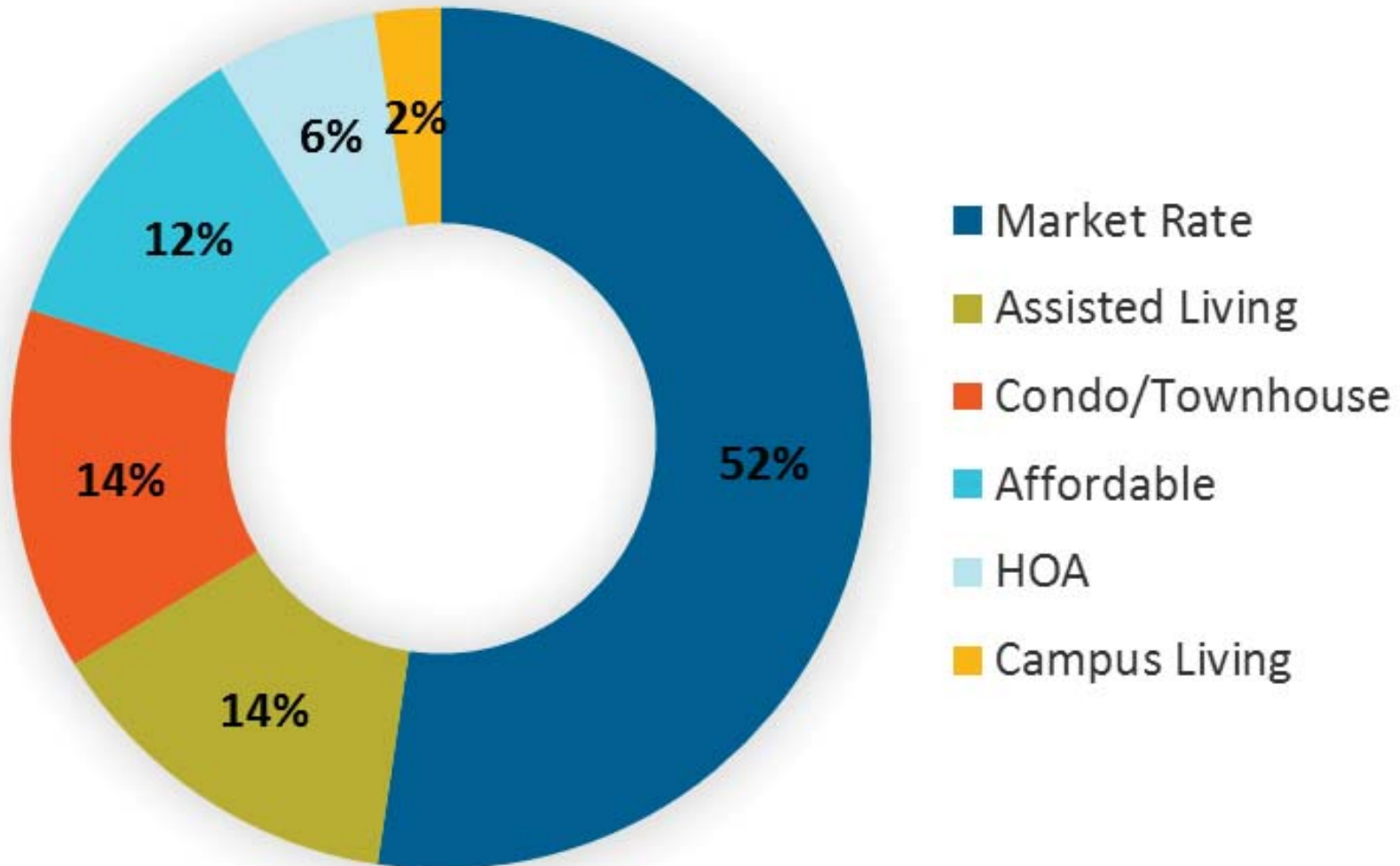
2015-2017 Incentives by sector – Statewide



Top Measures 2015-2017

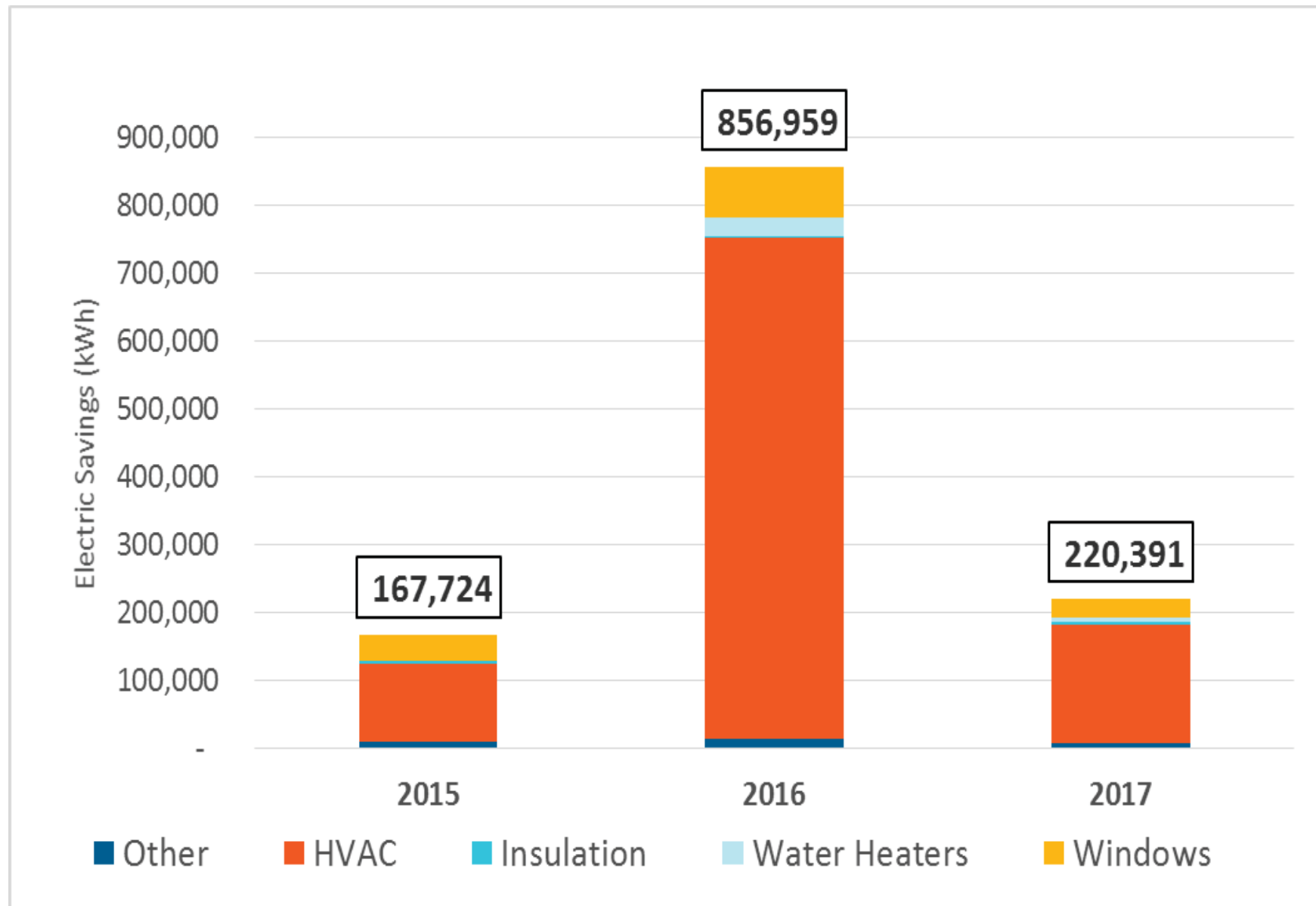
1. Windows
 - \$2,023,350
2. HVAC
 - \$1,637,750
3. Boilers
 - \$512,231

Incentives by Market Sector 2015-2017

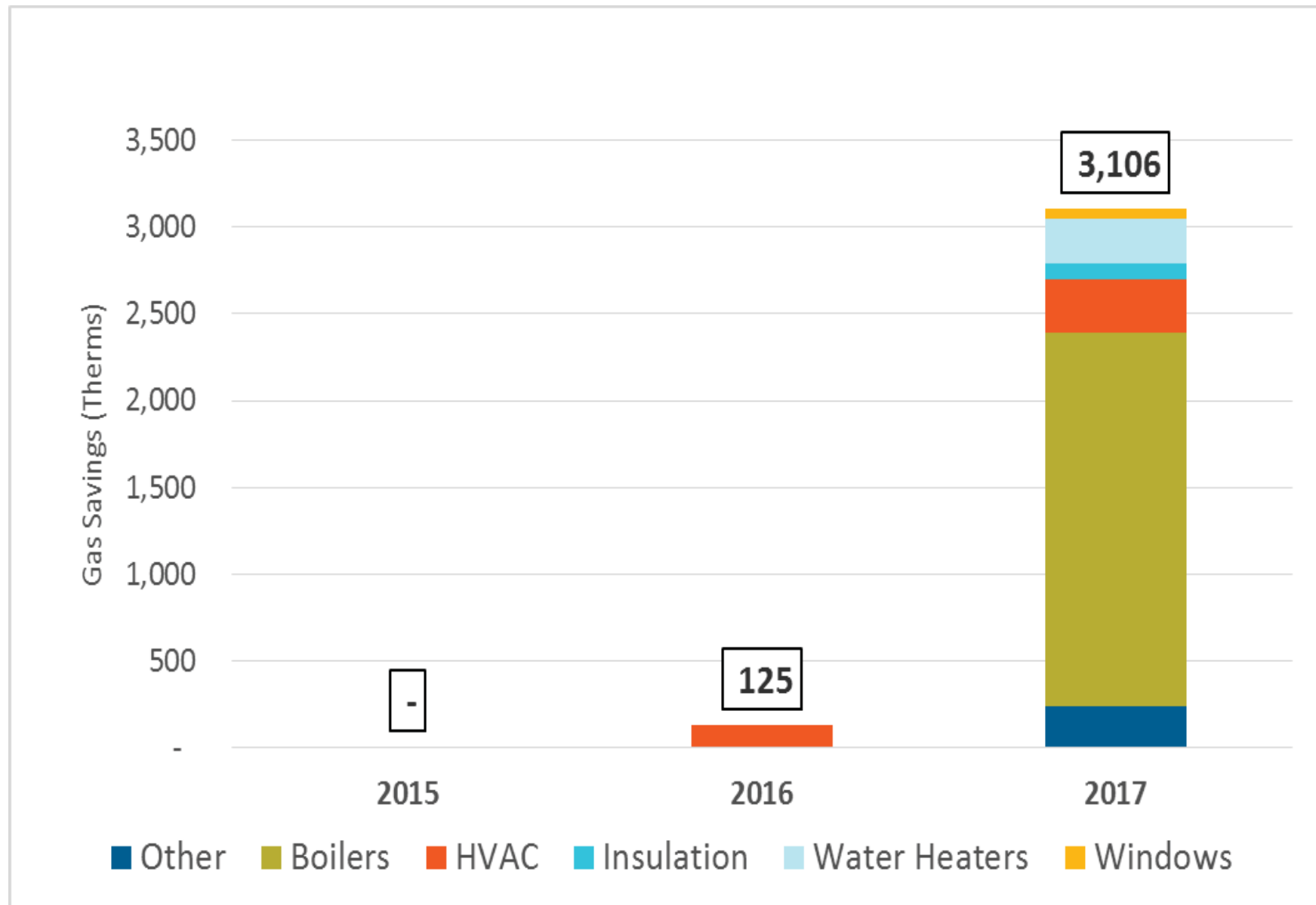


Southern Oregon

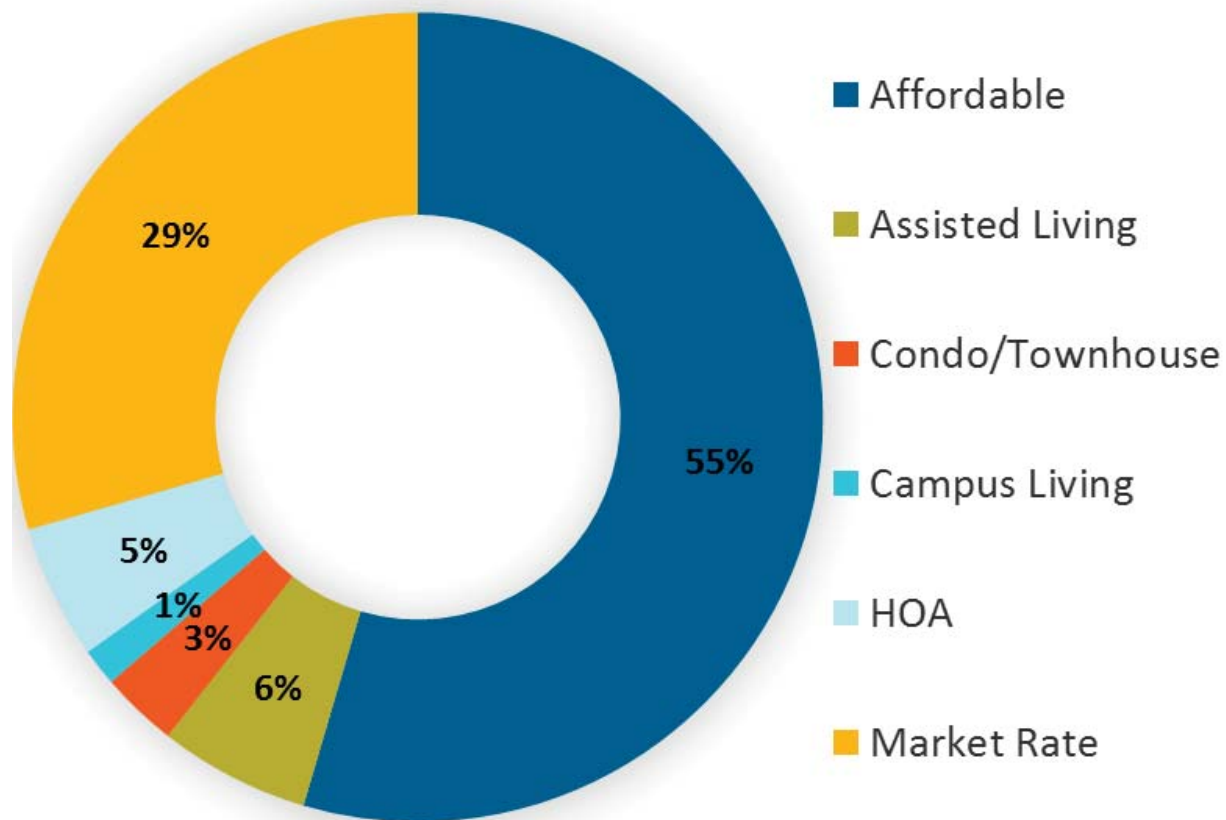
Prescriptive Electric Savings – Southern OR



Prescriptive Gas Savings – Southern OR



2015-17 Incentives by sector – Southern OR



Top Measures 2015-17

1. HVAC
 - \$241,163
2. Windows
 - \$73,413
3. Water Heaters
 - \$9,550

